



The World Market for Retail Tissue and Hygiene

April 2025

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Adjacent industries and how they impact Tissue and Hygiene

STATE OF THE INDUSTRY

Global tissue and hygiene faces slight setback before further demand recovery

STATE OF THE INDUSTRY

Price-led growth persists, though volume shows resilience in key markets
In tissue, paper towels leads growth in developed and advanced developing economies
Asia Pacific's strength in facial tissues further solidifies the region's global leadership
Toilet paper's prevalence calls for a strategy balancing value and premium
Away-from-home tissue charts a steady demand recovery
In hygiene, retail adult incontinence leads category growth across majority of markets
Menstrual care rises to partially compensate for nappies/diapers loss in Asia Pacific
Birth increase and population under-penetration underscore MEA's hygiene potential
State of adult incontinence in context: AFH and Rx segments carry local characteristics

COMPANIES AND PRODUCTS

Market fragmentation escalates in Asia Pacific and Middle East and Africa
Softys sees sustained share gain with strategic M&As and portfolio diversification
Insurgents chart rapid growth with consumer-centric innovations and channel strategy
Claims indicating health and safety drive sustainability attraction

CHANNELS

E-commerce gradually taking market share from bricks-and-mortar channels
US and China drive global e-commerce gains, with marketplace an attractive pivot

FUTURE OUTLOOK

China fast-tracks real value growth in tissue with premiumisation and diversification
Southeast Asia gains significance in hygiene growth with increased penetration
Inflation to have a key, yet diminishing, effect on retail tissue and hygiene growth
Regional growth decomposition unpacks unique local driver combinations
Total Trump Agenda scenario provides the most probably downward risk
Significant unrealised potential in developing Asia

CONCLUSION

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